

Information you may need when applying for insurance.



On the day you meet with your insurance agent to fill out your application for life insurance you may be asked many questions depending on the type of policy you are applying for. What you will need varies depending on the company. Below you will find some of the things you may need to make things easier on the day of your appointment

- Your primary doctors name, address and phone number. The approximate date of you last visit, the reason for the visit and the results.
- The name, address, and phone number of any doctor who treated you in the past 10 years. What you were treated for and the results of the treatment.
- The name of any medications you currently take along with the dosage, frequency taken (once a day, etc), and for what purpose you take it (high blood pressure, etc).
- The name, address and policy number of any similar policies you currently own. (Example: if you currently have life insurance you will need to include that information on the new policy.
- Social Security numbers for your beneficiaries. Not all companies require this information.
- Your net worth. (The value of everything you own) Not al companies require this information.
- Your liabilities (How much debt you have) Not all companies require this information.
- Employers name, address and phone number

You may need this information for each person applying for insurance.